

APPENDIX E –TRAVEL REQUIREMENTS

(07/08/05)

DEFINITIONS:

Traveler: The authorized consultant, subcontractor, or vendor traveling in support of the agreement into which this appendix is incorporated.

Agreement: The consultant agreement, subcontract, or purchase order into which this appendix is incorporated.

Federal Travel Regulation lodging, per diem and mileage rates can be found at: www.gsa.gov

The traveler shall be reimbursed for all travel authorized by the agreement in accordance with the following:

A. LOCAL AREA TRAVEL

1. Local area travel is defined as a directed or authorized trip on NREL business less than fifty (50) miles one way from the NREL site, the traveler's residence or place of business; normally completed within one (1) day or less; and includes consecutive day trips to attend conferences and meetings lasting more than one (1) day. However, travelers whose residences are located within the Denver metropolitan area, including Boulder, Colorado, will not be reimbursed for travel or meals to perform work at NREL.
2. Traveler may be reimbursed for actual cost of local travel by bus, train, taxi, or other public transportation.
3. Travel by personal automobile may be reimbursed at the current rate established in the Federal Travel Regulation per mile actually traveled via the most direct route, plus the actual cost of parking and toll fees.
4. Travelers may be reimbursed for meals if the traveler is in a local area travel status for more than 12 hours. Also, the traveler may be reimbursed for the actual cost of meals if a luncheon or dinner is arranged by the conference or seminar sponsor as an integral part of the function and the cost of the meals are not included in the registration fee.
5. Lodging costs are not reimbursed for local area travel.

B. DOMESTIC TRAVEL

1. Domestic travel is defined as any travel within the United States of America, its territories and possessions. It shall include trips to destinations of fifty (50) miles or more distance from the NREL site, the traveler's residence or place of business, and of anticipated duration of ninety (90) days or less.
2. **Transportation:**
 - a. **Airline** - Coach class airfare. Original, including electronic, receipts are required. Premium-class (any class of accommodations above coach) airfare shall not be reimbursed except when:
 - (1) No coach class accommodation is reasonably available. Reasonably

available means available on an airline that is scheduled to leave within 24 hours of traveler's proposed departure time, or scheduled to arrive within 24 hours of traveler's proposed arrival time.

- (2) Premium-class is necessary to accommodate a disability or other special need. Disability must be substantiated in writing by a competent medical authority.
- (3) No space is available in coach-class accommodations in time to accomplish the travel that is urgent and cannot be postponed.

If premium-class airfare is used, written justification must accompany the travel expense invoice.

- b. **Railroad** - First Class and Pullman fare not to exceed total cost of coach class airfare. Original receipts are required.
- c. **Cab and/or limousine** - Actual costs.
- d. **Personal Automobile Mileage** - At the current reimbursement rate established in the Federal Travel Regulation, not to exceed the total costs of coach class airfare. No extra fee or subsistence shall be paid if the traveler elects to drive rather than fly.
- e. **Car Rentals** - Actual costs supported by original receipts. Compact cars should be rented. Personal usage expense shall not be reimbursed by NREL. Absent advance, written authorization by the NREL subcontract administrator, NREL shall not reimburse the traveler the costs of collision damage waiver (CDW) or supplemental protection insurance above the minimum requirements regulated by the law of the state or country in which the rental car is operated.
- f. **Public Transportation** - NREL encourages the use of public transportation where feasible for travel to and from the airport.

3. **Lodging:**

- a. Actual costs of hotel/motel accommodations, which should follow as closely as possible the Federal Travel Regulation for the area. Moderate accommodations are expected to be selected. Original receipts are required and per diem amounts should not exceed those listed in the Federal Travel Regulation per diem rates or as otherwise noted.
- b. Written justification must accompany the travel expense invoice when these limits are exceeded. Reasons might include:
 - (1) Transportation offset.
 - (2) No other accommodations available.

4. **Meals and incidental expenses:**

An allowance, in lieu of actual expenses for meals and incidental expenses (tips and personal luggage handling fees), shall be paid for any trip exceeding twelve (12) hours and for which the one-way distance is fifty (50) miles or more. Current reimbursement guidelines are $\frac{3}{4}$ of the daily per diem amount on the day of departure for the city the traveler is departing for and $\frac{3}{4}$ of the daily per diem amount on the day of return for the city the traveler is returning from, regardless of departure or arrival time. Other than

departure and return days, full per diem is paid for official travel days.

5. **Other Expenses:**

Other reasonable business expenses such as airport and hotel parking fees, public transportation, valet and laundry services will be reimbursed. Reimbursement for laundry services is limited to domestic trips exceeding six (6) days and shall not exceed \$10.00 for each consecutive seven (7) day period. Actual expenses shall be supported by original receipts.

6. **Phone calls:**

Traveler will be reimbursed actual expenses for necessary local and long distance business calls. Personal long distance calls to the traveler's home will be reimbursed at actual cost not to exceed an average rate of \$4 per day up to a maximum of \$12 per week while traveler is on travel. To be eligible for reimbursement for personal calls, the trip must be of at least two nights duration.

7. **Refunds and credits:**

Refunds and credits received by the traveler shall be returned to NREL. For example, the costs of meals included as a portion of a conference or seminar registration fee that is paid by NREL must be deducted from the total per diem amount claimed for meals by the traveler on the travel expense invoice.

8. **Lodging with Friends or Relatives:**

a. There are times when a traveler's lodging and/or food may be provided by friends or relatives. NREL shall reimburse the traveler for this expense provided:

- (1) The amount of lodging reimbursement does not exceed \$25 for one night stay or \$40 per trip.
- (2) Travelers claiming this lodging reimbursement shall not be entitled to lodging expenses for each night involved in the stay.
- (3) Travelers are entitled to regular meal allowances for these days.

b. Travelers who use this provision should place an asterisk by the amount claimed for lodging on the travel expense invoice and provide an explanation with the notation "stayed with friends" or "stayed with relatives" and the date(s) of the stay. Receipts are not required.

9. **No Direct Billing to NREL:**

The traveler shall not request or make arrangements for anyone to bill NREL directly for any costs incurred.

10. **Documentation of Expenses:**

a. Reimbursable expenses except meals must be itemized on the travel expense invoice on a daily basis. A per diem allowance for meals must be calculated by time of departure and completion of trip by the traveler. Such trips shall be deemed to have commenced when the traveler leaves the NREL site, the traveler's residence, or place of business, for the purpose of fulfilling the trip

assignment and shall continue until return to the NREL site, the traveler's residence or place of business. The invoice must be sufficiently documented and supporting original, including electronic, receipts attached.

Mandatory original receipts include:

- (1) Airline, railroad and bus ticket.
- (2) Lodging.
- (3) Car rental contracts.
- (4) Single expenditures exceeding \$75.00.
- (5) All other receipts specifically identified in this appendix.

- b. It is imperative that the purpose of a trip be completely documented and explained to justify the reimbursement and allowability, allocability, and reasonableness of the cost.
- c. In the event the mandatory original receipts specified in (a) above are not available, the traveler shall supply a copy of the receipts with a certification that the original receipts are required for its accounting system and that all expenses billed to NREL were incurred in the performance of the agreement, are being charged only to NREL, and that there is no duplication of billing for this trip. The following certification shall be included on the applicable invoice when receipts are missing, and signed by the consultant/subcontractor/vendor:

"It is hereby certified that the original receipts for the expenses being billed hereunder are required for the consultant/subcontractor/vendor's accounting system; all expenses billed under this agreement are allocable to the work performed hereunder; and no expenses is or will be duplicated under any other project performed by this consultant/subcontractor/vendor.

Signature of consultant/subcontractor/vendor or
authorized official of consultant/subcontractor/vendor"

Date

C. **FOREIGN TRAVEL**

Foreign travel is defined as travel (either wholly or partly on official business) from the United States (including Alaska, Hawaii, the Commonwealths of Puerto Rico and the Northern Mariana Islands, and the territories and possessions of the United States) to a foreign country and return, or travel between foreign countries by persons, including foreign nationals, whose salaries or travel expenses will ultimately be funded in whole or in part by NREL/DOE from its appropriations. Foreign travel also includes travel funded by non-NREL/DOE sources for which the traveler represents the Department, NREL, or conducts business on behalf of NREL/DOE or the U.S. Government.

Unless the agreement specifically requires foreign travel, the traveler shall not be reimbursed for any such travel. If foreign travel is necessary in furtherance of an agreement, a request for approval of the travel shall be submitted to NREL a minimum of forty-five (45) days prior to the planned departure date and such travel shall not commence prior to receipt of DOE approval.